



# The Carlsbad Library and Arts Foundation *Times*

"One Gift Can Change A Life Forever"

## Foundation Welcomes New Community Partner... Businesses Offer Commitment to Support Foundation Efforts

The Foundation is pleased to have four members in the Community Partners program. These businesses offer their annual support to the Foundation's mission to provide for Carlsbad's library and arts facilities and programs and community literacy.



Carlsbad Library and Arts Foundation welcomes Point Loma Credit Union as its newest "Community Partner" in a unique program to recognize library patrons. (l. to r.) Rebecca Moore, Business Development Manager; Simine Bruck, Branch Manager, La Costa; Heather Pizzuto, Carlsbad City Library Director; and Gina McBride, Foundation trustee.

*photo credit: Bill Richmond*

The Foundation is delighted to welcome **Point Loma Credit Union** as its newest Community Partner. The La Costa Branch has initiated a unique program that contributes funds to the Foundation when patrons of the Carlsbad City Library become members of the credit union.

Upon presentation of the library cards, the usual \$5.00 joining fee for new members of the credit

union will be donated to the Carlsbad Library and Arts Foundation. Additionally, the company will provide matching funds of \$5.00 for each new membership up to \$250 per quarter. The funds will be collected and presented to the Foundation on a quarterly basis.

**Rebecca Moore**, Business Development Manager with Point Loma Credit Union is also a Trustee on the Foundation Board. Mrs. Moore, who designed the program, said "I believe this is an ideal way to recognize our local library patrons and to give back to the community. That's what credit unions are all about!"

**Simin Bruck**, manager of the La Costa Branch, located near the library, is enthusiastic about being a Community Partner with the Foundation. "We look forward to welcoming new members to our credit union through this opportunity and being involved with the library and its outstanding work here in Carlsbad."

**Starbucks** at La Costa Avenue and El Camino Real, a Community Partner since 2004 welcomes a new store manager. **Nicky Rossow** and assistant manager **Jamie Ralph** will be serving coffee at the Castles of Carlsbad home tour on Saturday, May 5. Starbucks District Manager, Liam Kelly is

## Seniors Can Benefit from New IRA Charitable Gift Rules But Plan Carefully

Gina P. McBride, CFP, CSPG

Generous senior donors can plan their IRA distributions and annual giving differently this year thanks to the new IRA Rollover to Charity provisions in the Pension Protection Act of 2006 enacted in August. Now IRA owners over 70 and one-half can make outright, non-deductible gifts up to \$100,000 per year from IRA assets by direct transfer to public charitable organizations, without claiming the amount as taxable income. This new "qualified charitable distribution" (QCD) counts toward the annual required minimum distribution calculation, making gifting from IRA assets even more attractive.

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## Mission Statement:

To seek, cultivate and provide financial support for our library and art facilities and programs to promote lifelong learning and cultural enrichment in our community.

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# Message From the President



**Jim Comstock**, President of the Carlsbad Library and Arts Foundation



Architect's rendering of the remodeled Carlsbad City Library Learning Center on Eureka facing Holiday Park. There will be a second story added and other structural changes on the property. **This will be the new home of the Adult Learning Program and Centro de Informacion with room to expand literacy programs and services to the community.**

## Community

### What makes a community great?

Significant discussion has taken place about this topic. In many instances the answers center on places, projects or physical aspects. The Carlsbad City Library Learning Center is one of those places. The Learning Center is an example of what makes Carlsbad a great city. Additionally, the Learning Center is an example of what can happen when people come together to make a great thing happen. So how do we define community?

**The people define community.** It is the people who interact and bring their collective wisdom to the table that ultimately defines community. Lynda Jones was the first director of the Adult Learning Program. The program has received accolades and awards for its outstanding work. When you strip out the excellence of the program you see that people run the program and it is the people who make it great.

The Foundation has Community Partners in Albertsons, Jerry Bryan Photography,

Starbucks and Point Loma Credit Union. These great organizations have excellent people working for them. They foster an environment that draws great people who in turn develop the company into an even greater organization. This fostering of excellence happens in Carlsbad and specifically within the foundation.

The Foundation hosts the annual Castles of Carlsbad Home Tour and there is a committee that runs the home tours. When you look at the home tour committee and see the energy, creative thinking and amazing forethought, you see a collective group of "people" coming together to do the common good better. **Sandy Golnick** chairs that committee and her drive, knowledge and passion show in how that committee functions. Again it is people who make community.

**Carlsbad residents care about each other.** It is this caring and interaction that bring the residents together that collectively make Carlsbad a great city. Sure we have incredible

beaches, parks, restaurants and fabulous shopping but without the people, none of this would matter.

**So reach out and talk with your community residents.** Be part of your community. Problems are solved through partnerships and partnerships require trust and interaction. We want Carlsbad to be a successful community that sustains itself by meeting the needs of its residents and evolving to the ever-constant changes. In essence, we want a great community.

*Jim Comstock, President*

### Behind the Books Tours

*The Foundation invites you to join in a Behind the Books tour of Carlsbad City Library facilities. See how the literacy and learning programs are changing people's lives in our community — and how you can help.*

*For more information, please call the Foundation office at (760) 602-2060.*

### Partners continued from page 1

"excited to be working with the Foundation for the benefit of the community." When you get that great cup of coffee at the home tour or at the La Costa Starbucks, be sure to welcome Nicky and Jamie and thank them for their generosity.

Jerry Bryan of **Jerry Bryan Photographic Studio & Gallery** a Community Partner since 2004 and popular Master Photographer serving Carlsbad for many years, is once again providing his custom lifestyle family portraits to each of the homeowners on the 2007 home tour. In addition to presenting them with lovely portraits for their homes, Jerry

will mount and frame the six photographs for display in the lobby of the library on Dove Lane. The portraits of the homeowners from the previous tour will be relocated to another part of the library. Jerry's exquisite portraits are truly family treasures!

Thanks to Alan Meyers, Store Director for both La Costa and the Carlsbad Village stores, **Albertsons** became our first Community Partner. Alan has provided wine and catering for Foundation events and has also served on the board. Ask the store personnel to link the Albertsons ID Number for the Foundation, **490001290584**, to your

Preferred Savings Card and the Foundation could receive up to \$7,200 per year from the company. Every time you shop, you will be contributing to the Foundation. Albertsons sends generous checks to the Foundation every quarter...so keep shopping at Albertsons! Ask your family and friends to make the Foundation link too!

Community Partners are invited to Foundation events, acknowledged in all publications and receive a stylish, personalized plaque to display showing their support. If you wish to learn more about the Carlsbad Library and Arts Foundation's Community Partners program, please call the Foundation office at (760) 602-2060.

# News From the Library Director



**Heather Pizzuto**  
Director of the  
Carlsbad City  
Library

With several multi-year technology projects completed, the Library's attention is now focused on construction of the Learning Center. The site at 3368 Eureka Place is alive with activity. The roof of the former Girls' Club building is now off, and framing for the second floor is underway. As the Adult Learning Program and the Centro de Información plan for occupancy of this long-awaited facility that will allow them to combine forces and quadruple their floor space, the Learning Center finally feels like a reality. Estimated completion is summer, 2008.



Construction has started on the new learning center with completion scheduled for Summer, 2008.

*photo credit: Bill Richmond*

We are so grateful to the Library and Arts Foundation for its commitment to completing the funding of this project. Helping adults improve their literacy skills, introducing library resources to those who are not aware of them, helping children discover reading and succeed in their learning...these are the vital services that will be delivered in the Learning Center. What a way for the Library and the Foundation to partner in having an impact on the Carlsbad community.

## Gifts continued from page 1

The measure is beneficial for donors looking for simplicity in major gift planning and those wishing to give more than the annual limit of 50% of Adjusted Gross Income (AGI), to perhaps pay off a multi-year pledge or fund a capital gift such as for the learning center. The Foundation is currently conducting a capital campaign to fulfill its commitment to contribute \$1.5 million for the completion of the Carlsbad City Library Learning Center. (The learning center and the campaign will be discussed more next issue, but please contact Foundation office if you wish to have information now.)

Under this temporary provision, couples can gift a total of \$200,000 this year (up to \$100,000 per IRA owner). The rules assist donors who aim to minimize or avoid the additional tax many pay on Social Security income, as the amount distributed directly to charity is not included in the calculation to determine taxation of those benefits.

This measure is especially helpful to donors who are among the majority of taxpayers who do not itemize on their income tax returns. Rather than paying tax on the distribution, then gifting the net amount to their favorite charity, they can have that full amount transferred directly to charity, not diminished by taxes.

This powerful temporary tax benefit was only enacted for years 2006 and 2007 and dictates that gifts to charitable trusts, gift annuities, donor-advised funds and supporting organizations do not qualify for this special tax treatment. However legislative measures have been introduced that would extend the benefit period and could include these charitable instruments.

## 2007 Board of Trustees

The 2007 Carlsbad Library and Arts Foundation Board of Trustees once again brings together a dynamic group of professionals working diligently to provide significant financial support for our library and arts facilities, programs and services.

This year the Trustees are focusing on the capital campaign for the Carlsbad City Library Learning Center, presenting the upcoming fourth annual Castles of Carlsbad Home Tour, growing the foundation's gifting programs and strategically planning for the future.

### Board of Trustees:

President	<b>James Comstock, CPA</b> <i>Comstock and Associates</i>
Vice-President	<b>Trudy McGrath</b> <i>Coldwell Banker Real Estate</i>
Treasurer	<b>Alan Marblestone</b> <i>Attorney, Retired: Artist</i>
Secretary	<b>Gina McBride, CFP®, CSPG</b> <i>McBride Financial Advisory &amp; Philanthropy Concepts</i>

<b>Mike Bours</b> <i>Chief Technology Officer EDmin.com</i>	<b>Stephen "Hap" L'Heureux</b> <i>Estate Planning Attorney</i>
<b>Marie Bradley, Trustee</b> <i>Carlsbad Library Board</i>	<b>Ayesha Lewellen</b> <i>Health Administrator, Retired</i>
<b>Farrah Douglas</b> <i>CDS Printing</i>	<b>Rebecca Moore</b> <i>Point Loma Credit Union</i>
<b>Richard Fox, CPA</b> <i>Carlson Restaurants Worldwide</i>	<b>Julie Nygaard</b> <i>Former City Council Member City of Carlsbad</i>
	<b>Michael Thome</b> <i>Edward Jones</i>

### Ex-Officio Members:

<b>Heather Pizzuto</b> <i>Library Director City of Carlsbad</i>	<b>Peter Gordon</b> <i>Cultural Arts Manager City of Carlsbad</i>
<b>Foundation Assistant</b> <b>Anita Minard</b>	<b>Newsletter Editor</b> <b>Gina McBride</b>

Many senior donors are choosing to make larger lifetime gifts from IRA assets during this window of opportunity. In addition to the tax benefits, donors can enjoy seeing the results of their gifting now.

Careful planning is the key to developing a gifting plan that maximizes the benefits for donors, their families and their favorite charitable organizations. We can assist you and your advisors in arranging a gift that works best for you and furthers the mission of your favorite charitable organization.



## *Special Thanks to Our Incredibly Gracious Homeowners*



**"California Ocean Dreams"** Sheri Sharman  
Photography provided by Carlsbadimages.com



**"The California Gallery"** Garry and Evelyn Lee  
Photography provided by Carlsbadimages.com



**"The California Vineyard"** Peder and Julie Norby  
Photography provided by Carlsbadimages.com



**"The California Tuscan"** Bart and Susan Stotler  
Photography provided by Carlsbadimages.com



**"California Sand Castle"** Pat and Debbie Kerins  
Photography provided by Carlsbadimages.com



**"The California Hacienda"** Eric and Gina Anderson  
Photography provided by Carlsbadimages.com

## **Thanks to...**

Armstrong Garden Center at the Flower Fields, Carlsbad City Library, Carlsbad Convention and Visitor's Bureau, Madison's Carlsbad Village, Wendy Hinman, Konny Thompson, Carlsbad Magazine and all the Wonderful Volunteers!

### **"CASTLES OF CARLSBAD" 2007 Spring Home Tour Committee**

Sandy Golnick, Chair • Trudy McGrath, Gina McBride, Anne Linehan, Becky Moore, Lauren Ruehring, Kate Thome, Ann Collins, TJ Stroben, Anne Luke



# CARLSBAD LIBRARY AND ARTS FOUNDATION

Presents the Fourth Annual

## “Castles of Carlsbad” 2007 Spring Home Tour

featuring  
“THE CALIFORNIA COLLECTION”

Many Thanks to Our Generous Home Tour Sponsors

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### ~ EMERALD SPONSORS ~



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Net proceeds will benefit the Foundation's mission to provide financial support for our library and arts facilities and programs.

Please visit [www.castlesofcarlsbad.com](http://www.castlesofcarlsbad.com)



## The Carlsbad Library and Arts Foundation

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1775 Dove Lane, Carlsbad, CA 92011
- ☐ Send:
  - ☐ Foundation Information
  - ☐ "Community Partner" Info
  - ☐ Learning Center Capital Campaign
- ☐ Contact me about bequests or gifting opportunities
- ☐ Add me to your contact list

*Thanks for your support!*

#### Only 5 Seat Plaques Left – Don't Miss Out!

*For a tax-deductible contribution of \$250, we will place a permanent, personalized brass plaque on a chair in the Ruby G. Schulman Auditorium at the Carlsbad Library on Dove Lane. "The Schulman" enjoys full capacity audiences for concerts, plays, lectures and more — many at no charge.*

### Coming Next Issue:

**2007 "Castles of Carlsbad"**  
4th Annual Home Tour a big success!

**Capital Campaign 2007**  
Help us build the new Carlsbad City Library Learning Center!



*photo credit: carlsbadimages.com*